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CANADA'S TOURISM MONTHLY

December 2002

Buchanan concludes 8-year reign

Gay Games VII in Montréal

Feature – Canada's shopping destinations



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Editorial

by Peter Kingsmill

Shoppers, tourists, and getting more than asked for

Tourists love to shop, say market studies. Growing numbers of tourists also have a desire to meet local people, so... what better way to combine the two activities than to go on a shopping spree in just about any community in Canada.

Whether it's picking up a loaf of bread and a dozen eggs at a small-town grocery, or browsing the elite shopping district of a large metropolis, the shopper comes through the experience with a deeper appreciation of the community. And, of course, the community gains a very special appreciation of the tourists who have put their money on the table in exchange for goods and services!

Visiting shoppers leave some of their money behind, of course, but they also carry the potential to change the dynamics of a local community, and that change may not always be welcome or even useful. Certainly, more is not always better; a case in point might be what happens when cruise ships offload 4500 shopping-hungry seniors into the downtown core of a port city. Or, less dramatically but still troublesome, a 48-passenger motorcoach stops at the lunch counter of a one-café town in rural Manitoba – at noon.

To be sure this is a free enterprise society, there is money to be made by local businesses, and there is a surprising tolerance and understanding among Canadians of the need for businesses to prosper in order to provide services and pay taxes. However, questions are beginning to be asked about the depth of this tolerance, especially in cases when tour companies and their operations pollute the waters, disrupt local lifestyles, and stretch public infrastructure to the limit.

According to a recent article in the St. John's Telegram, between 1998 and 2000 one of the world's largest cruise lines, Royal Caribbean, faced three sets of fines totalling \$33.5 million U.S. for dumping oil and hazardous chemicals. Similarly, there are communities in rural Canada concerned that tourism traffic is taking an undue toll on their roads, with no tourism revenue accruing to local coffers.

Concerns of this sort are being examined as part of attempts to understand the concept of sustainable tourism. There is an article on the subject in the Research section this month; Canada has an opportunity to be a leader in addressing sustainability. 🍁

Peter Kingsmill, Editor-in-Chief



On the cover: The city of Montréal dresses up for its annual Christmas shopping extravaganza. Photo: Stephan Poulin, courtesy ©Tourisme Montréal.

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TOURISM

CANADA'S TOURISM MONTHLY

December 2002, Volume 6, Issue 10
ISSN 1499-5719

TOURISM is published by the Canadian Tourism Commission in cooperation with the Canadian tourism industry.

■ The Canadian Tourism Industry

Vision: Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission: Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

www.travelcanada.ca
www.canadatourism.com (CTX)

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Hull Qc J8Y 4B6
Tel.: 1 877 505-2110
www.seguinlabelle.com

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TOURISM – Canada's Tourism Monthly is delivered to your mailbox as a service of the CTC at no extra cost to you!

How to subscribe: Send your name, address, organization, language preference and e-mail address to: tourism@ctc-cct.ca. Fax: 613-946-2843

If you wish your tourism association or staff to receive *TOURISM*, please contact Lana Bérubé at 613-954-3884 to discuss how we can receive your association's mailing list.

■ Canadian publications mail product sales agreement number 1468367

The views and opinions expressed in *TOURISM* are those of the authors and not necessarily those of *TOURISM* or the Canadian Tourism Commission.

■ Votre copie française de *TOURISME* est disponible en composant le : 613-954-3884

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Industry benefits from teamwork



Photo: Anna MacDonald

American Bus Association (ABA) president Peter Pantuso (left), presents David MacKenzie, CEO of Charlottetown's Confederation Centre of the Arts, with the ABA's Crystal Bus Award during the Tourism Industry Association of Canada annual meeting held in November in the P.E.I. capital. The ABA has named the Charlottetown Festival the Top Canadian Event in 2003. Looking on are Jim Watson, president of the Canadian Tourism Commission, and Randy Williams (right), president of the Tourism Industry Association of Canada.

Someone once told me that alphabet soup was invented in Ottawa, because there are so many different acronyms used in the Nation's Capital. DND, HRDC, TB, PCO, PMO, and FIP are just a few of the abbreviations for the apparatus of Government.

We in the tourism industry also have our share of acronyms: TIAC, HAC, ACTA, CTHRC and ATAC to name a few. Despite the jumble of letters, these groups work very hard for the tourism industry and with us at the Canadian Tourism Commission (CTC).

These five groups – TIAC (Tourism Industry Association of Canada),

HAC (Hotel Association of Canada), ACTA (Association of Canadian Travel Agents), CTHRC (Canadian Tourism Human Resources Council) and ATAC (Air Transport Association of Canada) – and their staff deal with the CTC on a regular basis and the relationships developed have been mutually beneficial.

The presidents of these five major organizations are: Randy Williams (TIAC), Tony Pollard (HAC), Marc-André Charlebois (ACTA), Wendy Swedlove (CTHRC), and Cliff Mackay (ATAC). Each association and president realizes the benefits of working as a team because at the end of the day, we are all here to serve the industry.

Interaction between the groups is quite extensive. For instance, I am a member of TIAC, and TIAC board members and staff serve on our board and committees. I am also on the board of the Canadian Tourism Human Resources Council. The CTC is a partner at the Hotel Association of Canada's annual meeting and president Tony Pollard sits on one of our committees. In an effort to increase our dialogue, Tony and I agreed to share information and ideas, on a regular and formal basis, about the various challenges we face as heads of our respective organizations. And, we are working with ACTA to strengthen our ability to work with the trade sector.

I am proud of the work that these industry leaders do and look forward to working with them to strengthen our \$54 billion industry. 🍁

Jim Watson, President & CEO
Canadian Tourism Commission

This month marks the end of an era at the CTC – the retirement of our founding (and only) Chairman, the Honourable Judd Buchanan. Judd was the driving force behind the creation of the CTC and any credit for its success lies squarely with him. A respected former Parliamentarian and a successful businessman, Judd worked with the Prime Minister and the then Industry Minister John Manley to see the CTC born as a true industry-led public-private partnership.

Judd has single-handedly ensured that our budget from government was increased from \$15 million to \$83 million at a time when most other government departments saw their funds cut. He has been our goodwill ambassador abroad and at home and while he will leave us on December 31, his legacy will last forever. My sincere thanks to Judd for his leadership and vision, and I wish him well in his many other ventures. 🍁

Letters to the Editor

We always look forward to receiving Canada's Tourism Monthly. We were especially proud this past winter (March 2002) when Jim Watson expressed his gratitude and commented that the friendliness and generosity of his hosts were unmatched, referring to his visit to Northern Ontario and snowmobile ride in Espanola.

We found that reading the editorial in the October edition of your publication makes us feel "in stride" with our country as far as tourism marketing is concerned. We are forwarding information about a person from our area in response to the Canadian Tourism

Commission's appeal for people who have an interest in playing a leadership role in Canada's tourism industry.

We are in the process of amalgamating our regional tourism organizations and can truly relate to the change in tourism programs and infrastructure. The future opportunities for the stakeholders of our region are cutting edge and it is very encouraging to read *TOURISM* and feel in touch with the vision and mission.

Tara Bailey
Manitoulin, Ontario

A passengers' charter of rights?

Canada needs a "passengers' charter of rights" similar to the one adopted for the European Union. At the present time here in Canada, travellers are not well protected from being treated arrogantly by airlines. This poor treatment occurs at ticket counters as well as aboard the aircraft. When flight times change, delays are unexplained, and over-bookings are rudely dealt with and inappropriately compensated.

There seems to be no concept of fairness; there is an overwhelming

sense that "the airline company is always right" instead of the customer. There is a very different relationship in Europe, where airlines are compelled to honour and respect the rights of airline travellers. We need to adopt this civilized way to travel for Canada! 🍁

Domenico Panetta
Voyages David Inc.,
Montréal

We encourage our readers to submit letters on any topic or issue covered in *TOURISM* magazine. Please include your full name, address, and telephone number. The editorial board reserves the right to select and edit letters for publication.

Buchanan concludes 8-year reign



The Honourable Judd Buchanan.

The Honourable Judd Buchanan is stepping down as Chairman of the Board of Directors of the Canadian Tourism Commission (CTC). Buchanan has been the driving force behind the creation

of the CTC as a Special Operating Agency in February 1995 and its establishment as a Crown Corporation in January 2001.

Speaking from Vernon, B.C., where he maintains a significant interest in the ski resort industry, Buchanan touched briefly on some highlights of his time with the CTC. "Overall, it is the people in the industry who have made this task so enjoyable," he told *TOURISM*. "Their enthusiasm has made it possible for us to make great progress towards reaching our potential, and that potential is huge."

Buchanan has been aggressive in helping the tourism industry to make inroads into the Asian and Latin American markets. He feels countries in these regions, with

their large populations, will have vast tourism potential for Canada as their economies grow. He has been particularly active with the China file: "There seems to be a natural connection between the people in our two countries," he says. "At the very least, almost every community in Canada, large or small, has a Chinese restaurant; doubtless this is in part a by-product of the development of our national railway system when so many Chinese nationals came to this country as workers! Nonetheless, if you add in the high recognition factor of Dr. (Norman) Bethune and fence-mending efforts by Prime Ministers Trudeau and Chrétien, there is already a significant awareness of Canada in China, and this works to our benefit."

Buchanan is universally credited with forging the unique governance structure of the CTC. "I believe that this blend of industry and provincial, territorial and federal government representation has worked surprisingly well," he told the magazine. "I find it striking – and heart warming – how responsive all the CTC directors have been to their mandate as national representatives, in the broadest sense of the word."

Buchanan's resignation takes effect December 31, 2002. His replacement should be announced in late December. 🍁

See page 10-11 of this issue for a review of some of the highlights of Mr. Buchanan's journey with the Canadian tourism industry.

Gay Games VII in Montréal



Charles Lapointe, President and CEO of Tourisme Montréal headed a delegation of 200 Montréal athletes along with some 30 representatives of the Organizing Committee in Sydney, Australia for Gay Games VI in November. From left to right, John Mundy, Canada's Consul General, Sydney; Charles Lapointe; Donna Brinkhaus, CTC; and Mark Tewksbury, Spokesperson for the 2006 Games.

At an October meeting in South Africa, the Federation of Gay Games announced its choice of Montréal as the Host City for Gay Games VII to be held from July 29 to August 5, 2006. Montréal will host some 24,000 participants and 250,000 visitors who will inject an estimated \$150 million into the city's economy.

Right from the beginning of the lengthy bidding procedure, Montréal expressed its desire to make the 2006 version of the Games a major sporting and cultural celebration under the banner *RENDEZ-VOUS IN MONTRÉAL*.

Tourisme Montréal has recognized the importance of the gay and lesbian tourist market since 1994. The city has developed a series of major promotional activities to attract gay and lesbian tourists including an annual press tour for the gay media, Tourisme Montréal's involvement in several specialized travel trade fairs and specialty conventions, the creation of a promotional magazine entitled *Gay Destination: Montréal* and the recognition of *The Village* as a tourism centre. 🍁

For information visit www.montreal2006.org.

Inching towards recovery

Despite strong positive numbers for September (1.9 million), the total number of foreign overnight tourists coming to Canada between January and September 2002 (16.52 million) has experienced only a slight increase over the same period in 2001 (16.50 million). The beginning of a full recovery in overseas international travel to Canada, previously forecasted for 2002 following the tragic events of September 11, has yet to materialize.

Results published by Statistics Canada indicate international overnight travel to Canada increased by a significant 8.1 percent in September 2002, compared to September 2001. This gain was the third consecutive monthly increase in 2002. However, for the first nine months of 2002, the total numbers were up 0.1 percent, a marginal growth over the same period in 2001.

The total number of U.S. tourists coming to Canada was up 9.4 percent, in September 2002. The positive trend in the numbers of U.S. tourists entering Canada by automobile continued, up 7.1 percent in September 2002 and up 6.4 percent for the first nine months. The number of U.S. tourists entering Canada by non-automobile modes grew by 13.3 percent.

"The post-September 11 impact on the tourism industry is the most serious we've seen in years," said Jim Watson, President and CEO of the Canadian Tourism Commission (CTC). "As we witness shifts in tourism trends, such as travellers looking for closer to home destinations, or more American tourists travelling to Canada by automobile, the CTC has adapted its marketing efforts to encourage Canadian and foreign tourists to experience Canada." 🍁



West Edmonton Mall: an anchor for Alberta

Alberta's number one attraction is a shopping mall, according to West Edmonton Mall (WEM) general manager Gary Hanson. Touted as the world's largest entertainment and shopping centre, WEM is a shopper's paradise with more than 800 stores and services and 110 eating establishments within its 5.3 million square feet.

When first planned and built over 20 years ago, the mall was intended to be just that – a retail shopping mall for the residents of western Edmonton. The developers were quick to see the potential, however. According to Hanson, "when the developers added phase two of the project, they had already established that the mall needed components other than just shopping. That's when they introduced the entertainment component."

"Hanging out at the mall" takes on a whole new meaning at WEM, where the 400,000 square-foot *Galaxyland* (the world's largest indoor amusement park) offers

25 rides including *Mindbender*, the world's largest indoor triple-loop roller coaster, and *Space Shot*, one of the world's tallest indoor tower rides.

WEM is, in many ways, a one-stop destination. Two hotels, the attached 355-room Fantasyland Hotel, and the nearby West Edmonton Mall Inn provide visitors with everything they need on site.

Tour operators have recognized that WEM is a destination of choice for many people and have partnered with the Mall to provide vacation getaway packages to customers that include return airfare, accommodation at one of the Mall's two hotels and value-added incentives such as coupon books.

"Despite the fact that shopping has been identified as the number one activity of travellers, we know that people are not going to come here only for shopping," says Hanson. "We know that visitors want to do other things. For example,



Photo: West Edmonton Mall

The West Edmonton Mall is, in many ways, a one-stop destination.

the German market wants to experience wilderness and stay in five-star hotels."

"People are looking for unique experiences," he continues. "People want to see the mall, but they want to do other things. That is how we do our marketing: we partner with all the activity providers associated with the Edmonton region – fishing, golf, skiing, and so on. They use us to market their product, and we use them to market our product."

After 20 years the vision keeps growing. In the next 10 to 15 years the Mall's owners plan to go bigger, reaching skyward and becoming a "lifestyle" centre, where shopping, entertainment, living, and work space all come together. Plans include the addition of residential apartments, office space, more retail area and an 8,000-seat multi-use facility to the already diverse mix, along with a third hotel. 🍁

For information visit www.westedmall.com.

Creating a shopping destination by Daryl Adair



Photo: The Forks Market

The Forks Market is far from your typical mall.

The Red and Assiniboine Rivers have long been linked to Winnipeg's history and today, where the rivers join, Winnipeggers and visitors can enjoy one of Canada's finest shopping and historical destinations at *The Forks National Historic Site and Market*.

Locally referred to as simply *The Forks*, the area has a rich history

as a flood plain, a First Nations' hunting grounds, a fur trading post and a place where riverboats once unloaded cargo and immigrants. It was also a railway yard for over 80 years, keeping a significant area in Winnipeg's downtown largely undeveloped.

When the railway yard was no longer needed, the federal and provincial governments and the City of Winnipeg recognized the inherent value of the site and worked together to create a new attraction for Winnipeg. Parks Canada opened the first phase along the rivers in 1989, and the site has since grown to become the number one tourist destination in Manitoba.

Today, two large brick buildings once used as stables for the railways

have been transformed and joined together. This creates a large courtyard between the buildings, known as the *Forks Market*. The market features locally owned and operated shops with quality souvenirs, crafts and gifts. It offers a choice of fine dining or fast food restaurants, and a seemingly endless quantity of fresh produce, deli, seafood and baked goods.

The market receives over 3.5 million visitors every year. Moe Razik of Fenton's Gourmet Foods and chairman of *The Forks Merchant Association* says: "it is an environment for the whole family, a place where everyone can find something appealing." The market can't be thought of as a typical mall: shops and stores are independently owned and unique to *The Forks Market*, with authentic

food outlets that reflect the cultural diversity of Winnipeg.

Events play a big role at *The Forks*. Throughout the year, the market is surrounded by festivals, free concerts, and the city's Canada Day and New Year's Eve celebrations. A *Winter Park* offers toboggan runs, snowboarding, and ice-skating trails along the rivers. At the end of a busy day of outdoor winter fun, families and visitors partake of the warmth of *The Forks Market*, shop for Christmas, enjoy a mug of hot chocolate or pick up a bottle of wine. 🍁

Daryl Adair is the owner/operator of Rail Travel Tours and can be reached at www.railtraveltours.com.

Halifax a mosaic of history, culture, and shopping

Overlooking the Halifax harbour is Historic Properties, a fabulous place to explore. Within a nine-block radius in the heart of the downtown Halifax, visitors can find historic sites, museums, art galleries, pubs, sidewalk cafés and shopping all within an easy stroll.

Built in 1813 of wood, iron and stone, Historic Properties is Canada's oldest surviving group of waterfront warehouses. Today, it is the waterfront's shopping core where merchants sell hand-made wares, woolens, pewter gifts, art, handcrafts and pottery. This Halifax downtown shopping experience, a regional attraction for years, is now appealing to thousands of cruise ship visitors annually. 🍁



Photo: Destination Halifax.

Your money's worth – and more!

by Lydia McCourt

Foreign tourists shopping in Canada have an incentive to buy more. The Goods and Services Tax / Harmonized Sales Tax (GST/HST) Visitor Rebate Program encourages tourists to spend that extra loonie because they may be refunded the GST/HST portion of their purchase upon leaving Canada.

The Canada Customs and Revenue Agency (CCRA) set up the rebate program in recognition of the value of spending by foreign tourists in Canada. The Canadian Tourism Commission continues to work with CCRA to ensure that the program is well understood. Canadian tourism operators should encourage their clients to spend more in Canada because of this incentive. However, operators should also ensure their clients are aware of the rules they must follow to be eligible for the rebate.

In particular, tourism operators, as well as their clients, need to understand that their claims can be made either directly to CCRA or through privately owned com-

panies. Each method has its own advantages and disadvantages. For example, if you file directly to CCRA, the process is free, whereas private companies charge a fee for processing. On the other hand, private companies often rebate the claim directly to the tourist's credit card or issue a bank draft, whereas CCRA will issue cheques in Canadian or U.S. dollars only.

Regardless of how the claim is filed, both methods require one key element. To be eligible for the rebate, departing travellers need to stop in at the Customs office in the airport with their purchases and original receipts, which officials will stamp "exported." Tourism operators need to convey this message to their clients, as we hear often from disappointed tourists who were denied a rebate because they were unaware of this rule. 🍁

For more information, visit www.ccra-adrc.gc.ca/tax/nonresidents/visitors/index-e.html.

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Month	Features	Deadline: Articles/Advertising
January/February 2003	The CTC in 2003 and beyond In search of non-traditional partners	January 06, 2003
March 2003	CHOICES: travelling to and within Canada Canadian Highway Trails	January 31, 2003
April 2003	Experience SPRING in Canada Canadian Capitals	February 28, 2003
May 2003	CHOICES: where to stay in Canada Fishing Canadian waters	March 28, 2003
June 2003	Canadian niche products Product clubs, seven years later	April 25, 2003
July/August 2003	Experience SUMMER in Canada Exploring a new market: youth	May 23, 2003
September 2003	CHOICES: eating well in Canada Canada, a stage for learning	July 25, 2003
October 2003	Experience AUTUMN in Canada Discovering Canada through its museums	August 29, 2003
November 2003	CHOICES: new things to do in Canada Revamping Canada's attractions	September 26, 2003
December 2003	Experience WINTER in Canada Canada, a multicultural society	October 24, 2003

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Montréal a unique shopping experience

In Montréal, as in most major Canadian cities, shopping is a favourite activity for visitors. Nearly one out of every two tourists will shop while visiting Quebec's largest city, and almost 18 percent of the economic impact of tourism can be attributed to visitors' purchases, representing over \$300 million.

Montréal offers a shopping experience like no other in the world: shopping in a covered pedestrian area. This 30-kilometre network gives access – through 178 entrances – to 62 buildings, 10 subway stations, two train stations and, above all, almost 3000 downtown retailers. This is quite a shopping complex, all under one roof.

Additionally, downtown Montréal offers tourists a variety of attractive commercial streets where it is pleasant to relax, window-shop or make purchases. The shopkeepers contribute to Montréal urban life through their active involvement in the city's major events. For example, Sainte-Catherine Street is Canada's longest commercial street and hosts the *St. Patrick* and *Santa Claus* parades. Crescent Street is filled with activities including those associated with the *Formula One* and *Formula Cart Grand Prix*. Saint-Denis Street, in the Latin Quarter, welcomes the *Just for Laughs* festival every summer.

visiting Montréal's major downtown shopping streets (sample of 439 respondents). The majority (42.1 percent) enjoyed wandering and soaking in the sites while many (21.2 percent) went to a museum or other tourist attraction. Only 18.8 percent of respondents stated that their visit to the shopping district was motivated by shopping or eating in a restaurant.

However, over 27 percent of respondents spent \$100 or more while visiting the shopping district. The availability of commercial products thus contributes to impulsive buying, which increases the average spending by visitors.

Only 10.9 percent of visitors mentioned an interest in clothing. Of this number, a majority (56.1 percent) preferred boutiques to large or chain stores (24.6 percent). A high number of visitors (15.8 percent) mentioned an interest in designer boutiques, which lends itself nicely to Montréal's creative side, both as a fashion and tourist destination.

Apart from restaurants and clothing, the stores generating the highest interest are souvenir shops (18.4 percent), art galleries (6.4 percent), and alcohol and tobacco retailers (4.1 percent). 🍁

For more information visit www.tourism-montreal.org.

* A survey was conducted last year to identify the interests of tourists



Montréal offers a shopping experience like no other in the world.

Icelanders shop Newfoundland



Who would think of St. John's, on the east coast of Newfoundland, as a shopping destination? For some 1000 Icelanders, it certainly is! The province's capital city has become a shopping destination of choice for residents of Iceland, especially at Christmas.

City tourism officials have estimated that these shoppers spend over \$1200 each during a four-day stopover, and Icelanders say Newfoundland's prices and selection can't be beaten. However, there are other reasons they come to the city, including fishing industry trade shows, brewery tours and, of course, the annual Santa Claus parade.

A recent survey of Icelandic shoppers showed that the top three items purchased were clothing, Christmas decorations, and toys. 🍁

Shop 'til you drop in Southern Ontario

With alluring names like "Northern Lights Getaway", "The Ultimate Decadence Shopping Experience", and "Ale, Wine, Spirits and Savings", shopping getaway packages in Southern Ontario are marketed to interested consumers in Ontario and border U.S. states. The packages link unique, value-driven shopping experiences with shoulder-season stays at hotels, inns and B&Bs.

Shopping is a primary trip motivator for tourists. The Travel Industry Association of America (TIA) has claimed that the average spending per person per trip was \$333 (U.S.). One in five shopping travellers spend more than \$500. The TIA study said travellers who shop want to visit different (rather than familiar) stores, with 73 percent wanting to shop in stores that they do not have in their own city. Over 50 percent will visit a downtown shopping district or main street to find unique purchases.

Tourists buy more than souvenirs when they shop, according to TIA. They head first for clothing and shoes (77 percent buy these while travelling), then kids' toys (49 percent), specialty foods and beverages (42 percent), books or music (41 percent), souvenirs (39 percent), local items and crafts (37 percent),

and jewelry and accessories (36 percent).

On the hospitality side, hotels and other accommodations are eager to encourage off-season over-night stays. In many cases, occupancy rates are already high during the summer, so a concerted effort to boost visitation in fall and winter provides a direct benefit to the customer. The campaign combines the attractiveness of key destinations with the new and different allure of less known communities in Southern Ontario.

Packages range in price from \$99 to \$899 and include one overnight and numerous value added features such as specialty restaurants, exciting attractions and, of course exclusive shopping in familiar settings. "Package partners have spent hours putting together the very best in shopping experiences from their community. Retailers and tourism businesses are wisely offering a discounted package for the consumer, which in turn is a win-win for all", says Melissa Parker, chair of the Southern Ontario Tourism Organization's (SOTO) consumer and media committee. 🍁

For information visit www.shoppinggetaways.com.



A passion for quality



Marc-André Charlebois is president and CEO of the Association of Canadian Travel Agencies (ACTA). TOURISM spoke to him by telephone at his Ottawa office.

TOURISM: Could you characterize the three major challenges facing the travel trade today?

Charlebois: First on the list would have to be the state of the business, which I would characterize as "fragile". The whole travel industry is challenged right now, and that goes back a long way before the events of September 11, 2001. What September 11 did was to accelerate what was already a downtrend because of larger economic problems like the recession in the U.S. and the failure of the dot-coms. These have all had an incredible impact, first and foremost on business travel. We are not soon going to see a recovery in that sector.

Second, we are witnessing significant changes in the way people in the travel business – and I include

all the stakeholders in this – are doing business. There is a mish-mash of accelerated change affecting all the players one way or another. Some are cutting costs, others are trying to catch up on technology, some are seeing the Internet as a threat, and others are seeing it as an opportunity.

The third challenge is the broader public policy background against which all of this is happening. There is a need for serious review of the policies relating to travel, including the way products are put on the market and the way they are distributed. We need to look at issues of competition and the reality of having a dominant carrier in Canada.

TOURISM: How do you visualize ACTA's role in dealing with these issues?

Charlebois: To understand our role, we must ask ourselves "what is an association's purpose in life?" We have to represent the interests of our members, to speak on their behalf on the big issues, and to be their voice. Of course, it is not our role to intervene in the marketplace or to prop up dying agencies, or to meddle in the natural competitive environment of the retail travel business.

When we act as advocates on behalf of all our members, we must understand the machinery of government. We have to go to

decision makers with solutions, not problems, presenting ideal policy solutions.

To a degree, we can also help our members deal with suppliers. By bringing the suppliers "into the tent", we can help make sure there are mechanisms for a useful exchange of information between retailers and suppliers.

We also need to help travel agents brand themselves. By this I mean that consumers need to recognize that travel agents are, or aspire to be, professionals and meet certain standards. ACTA can help to promote this professionalism and its benefits to the consumer.

TOURISM: Progressive travel agents will be seeking new sources of revenue. Is this an opportunity for our country's travel agencies and its tourism product to come together?

Charlebois: Martin Taller is a travel agent who is seen in our industry as a forward thinker. He produced a report for Industry Canada that was presented at our conference in Calgary this year; many of his recommendations deal with an opportunity to start thinking about selling Canada. Specifically, this means looking at structures that put the small and medium-sized suppliers together with the travel agencies to package and sell Canada.

I am very enthusiastic about this approach and have been working at what I call phase one – bringing together suppliers and agencies through an Internet-based exchange to offer packages for sale through other agencies – strictly a "BtoB" exchange.

This approach might not have worked several years ago, but now, agencies are looking to re-invent themselves. Now it makes sense to move forward. I am very excited by this, and the ACTA board of directors has endorsed continuing the effort.

TOURISM: What is your vision for ACTA – what should it be doing 5 years from now?

Charlebois: I tell my colleagues we should be the best-managed industry association in Canada, and I sincerely believe we can be. It is an important personal goal for me to be at the head of a very well-managed small association that has not only done things well, but has done them transparently. It is not ACTA that should be in the limelight. It is ACTA that should get things done for its industry members, putting them out front with the public.

I am a passionate man; from my point of view this is my vision, my purpose, and why I am here.

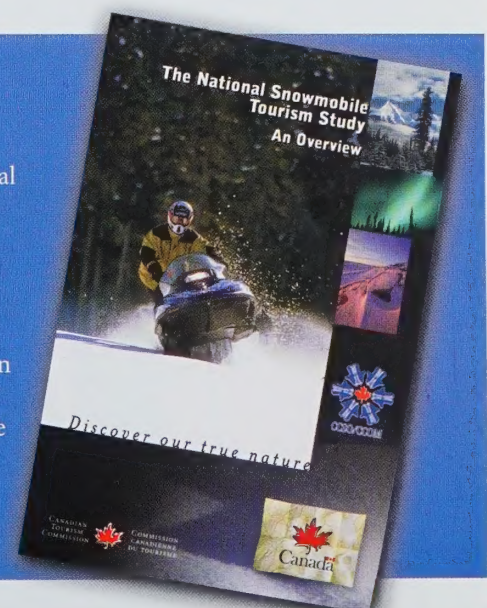
TOURISM: Thank you, Mr. Charlebois. 🍁

Snowmobile tourism study released

Canada is recognized as being one of the prime snowmobiling areas in the world. This activity has the potential to attract more visitors during the winter and encourage them to extend their trip.

To assess this opportunity and to provide an accurate picture of the current state of snowmobile tourism in Canada, the Canadian Tourism Commission (CTC) worked with the Canadian Council of Snowmobile Organizations and a number of other partners to commission the *National Snowmobile Tourism Study*. The study was recently completed by Pannell Kerr Forster in association with Research Solutions, the Canadian Tourism Research Institute, Drew North Consulting, and Lumley Marketing and Leisure Events Ltd. It offers the foundation for a national plan for the development of snowmobile tourism. Copy of the report is available from distribution@ctc-cct.ca or at www.canadatourism.com. 🍁

For more information: deneault.mylene@ctc-cct.ca.



The Road

A man with a vision

"Our \$7.9 billion tourism deficit can be significantly reduced if we work collectively to seize the opportunities the marketplace presents. There is a need for a unified, coherent approach, firmly based upon the federal government's declaration that it has a role both internationally and domestically, and that it wishes to work jointly with other partners in the development of the industry." (Report from the Honourable J. Judd Buchanan, Special Advisor on Tourism to the Prime Minister, October 1994.)

"Judd was an inspiration to me as I watched him expend tireless energy in promoting our great country. Clearly his prior public policy experience, his private entrepreneurial ventures, and the huge strength of his character, afforded him that rare luxury of bringing diverse people together to pursue a common good. Through his leadership at the CTC, Canada will take its rightful place as a world wide attraction - a place of beauty and peace, much like Judd."

Joe Houssian
Chairman, President and CEO
Intrawest

A man on a mission

From the beginning, Judd Buchanan had two objectives: give the tourism industry a strong voice in the decision-making process that impacted its livelihood, and find enough partners to match the core federal promotional funds. "It is vital that the decisions be made by those whose livelihoods depend upon the success of the tourism industry..." (Report from the Honourable J. Judd Buchanan, Special Advisor on Tourism to the Prime Minister, October 1994)

"It would be very difficult to imagine where the Canadian tourism industry would be if not for the Canadian Tourism Commission. We are part of the largest growing industry in the world and one that is extremely competitive. Countries around the world have recognized the importance of tourism. It is even harder to imagine what the Canadian tourism industry would resemble were it not for the hard work, dedication and wisdom of Judd Buchanan who has led the organization since its inception. Fairmont Hotels & Resorts is inextricably linked with tourism in Canada with a heritage that goes back over 100 years but it has only been since the formation of the Canadian Tourism Commission that we have felt competitive with other countries and other destinations."

"Judd's leadership has been unprecedented and he will be greatly missed as Chairman of the Canadian Tourism Commission but never forgotten by his friends in the tourism industry."

William Fatt
Chief Executive Officer
Fairmont Hotels & Resorts



Getting support from the Mounties.

A man of action

Key milestones:

February 1995 - The Canadian Tourism Commission (CTC) is established as a Special Operating Agency with a private sector-led board. Funding from the federal government increased from \$15 to 50 million annually.

"Judd Buchanan has put Canada, and all of us who work in the tourism industry, on the map at home and around the world. He has made it abundantly clear to everyone that our country's tourism operators both large and small face challenges that are not very different, and that the very diversity of the industry is its strength."

Ida Albo
Proprietor, Hotel Fort Garry
Winnipeg, Manitoba

	1994	2001	% change
Tourism expenditures (\$billion)	\$37.6	\$54.6	+ 45.2
Tourism employment (000)	480.4	563.5	+ 17.3
Travel deficit (\$billion)	\$4.1	\$1.3	- 68.3
World ranking			
Receipts	14	9	
Arrivals	12	9	

Convinced that governments were beneficiaries of tourism, Buchanan commissioned the CTC's research group to develop a Government Revenues Module as an extension of the Tourism Satellite Account. The results showed that every dollar generated from tourism contributed .31 cents to Canada's public purses.

"It is the diversity of Judd Buchanan's talents that have made him the unquestionable leader of our tourism industry. His finesse, his spirit of cooperation, and his sense of determination have enabled us to move farther and faster than we ever thought possible."

Marie Côté
Executive Vice-President
Jonview

April 1995 - The CTC re-introduces a domestic marketing campaign, launching its first Rediscover Canada program aimed at encouraging Canadians to travel within their own country.

"The creation of the Canadian Tourism Commission and its evolution to Crown corporation status were key to marketing Canada as a choice destination, both nationally and internationally. The name Judd Buchanan is closely linked to these events, and his legacy is deeply appreciated. Buchanan's pragmatic attitude and determined approach provided a context to ideas and actions for marketing Canadian tourism products. He taught me to refresh my view of our country's assets, and I thank him for his vision and profound commitment to our country."

Jean-Marc Eustache
President & CEO
Transat A.T. Inc.

to Success...

November 3 1995 - The CTC Board of Directors meets in Montréal to approve a first-ever program fully developed by the private and public sectors.

In 1997, as the Canadian economy weakened and budgets were being reduced, Buchanan was able to secure an increase in the CTC's annual budget from \$50 to \$65 million.

November 1997 - Constantly on the lookout for new markets with potential for Canada, Buchanan signed a Memorandum of Understanding between the National Tourism Administration of the People's Republic of China and the CTC laying the foundation for increased travel between the two countries. In 2001, the CTC opened an office in Beijing.

In 1999, tourism revenues for Canada surpassed the \$50 billion mark, a year earlier than predicted.



"When the Canadian Tourism Commission was created, it was clear its success would depend on effective leadership. Judd Buchanan provided such leadership in spades. Canada's tourism industry had worked long and hard to achieve a private-sector-led tourism marketing partnership at the national level. When the federal government created the CTC, industry support for the agency's structure and means of operation rested, in large measure, on the credibility Judd brought to the chair. We knew the CTC would be in good hands, thanks to his demonstrated energy and passion for tourism and the industry-government partnership approach. As Chairman of the newly created CTC, Judd ensured it was industry-driven and largely free from political interference during its critical formative years. His careful stewardship and wise guidance set the stage for the successes that are possible today."

*Peter Elmhirst
President, Elmhirst's Resort
Keene, Ontario*

January 2000 - The Canadian Tourism Commission becomes a Crown Corporation.

December 31, 2002 - As his chairmanship comes to an end, his vision has been largely fulfilled. The CTC has become an innovative partnership between governments and industry to jointly promote the excellence and competitiveness of the Canadian tourism product, and market Canada as a preferred international destination. Under Buchanan's leadership, the CTC has become a world-wide marketing agency and a model to other destination marketing organizations. And, Canada has regained its reputation as a world-class destination.



Dear Judd:

I asked you almost nine years ago for advice on the promotion of tourism in Canada. You prepared a first class report which has served as a model. As a result of your report, you were appointed Chairman of the Board of Directors of the Canadian Tourism Commission. Your salary was \$1 a year. By taking your retirement from this post, you have spared us the payment of a tenth dollar.

But, in all seriousness, you have put in countless hours for no pay. You have set a fine example of public service and commitment to our country. When you began this job, the tourism deficit in our balance of payments was about \$4.5 billion per year. Today, it is about \$1.5 billion. Tourism revenues have also increased from about \$35 billion to \$55 billion per year. This means more jobs and economic growth right across the country. Canadians owe you a debt of gratitude for what you have accomplished.

Aline and I wish you and Kay all the best as you and I prepare for our next careers.

A handwritten signature in cursive script, reading "Jean Chrétien".

The Right Honourable Jean Chrétien
Prime Minister of Canada

Calling all creative minds!

The Canadian Tourism Commission (CTC) is once again inviting the tourism industry and its partners to join the Product Club family. Since 1996, the CTC has received business plans with clear goals to bring new or improved products into the burgeoning Canadian tourism industry. Thirty-five product clubs have been created, as diverse as Special Needs Tourism, Golfing, Inland Cruising, and many more.

A product club is a partnership of participants with a common vision

for the development of a specific tourism product or niche. The CTC has launched the 2002-03 *Request for Proposals*, inviting industry to submit its best ideas by 5 pm, February 3, 2003. 🍁

For further information on the program and submission procedures, please telephone Judith Samuels-Ouellette at 613-952-9847 or visit: www.canadatourism.com/productclubs.



Tourism excellence program launched

The National Quality Institute (NQI) has launched the Ontario Tourism Excellence Program, dedicated to the enhancement of quality and excellence within the tourism industry. The program, supported by the Ontario Ministry of Tourism, Culture & Recreation, is a quality recognition and certification program, committed to promoting excellence across all areas of the tourism sector.

Conducting research into innovative approaches and practices of successful organizations is part of the on-going work of NQI. The tourism excellence program is based on criteria established by NQI and will assist tourism organizations in their quest for excellence. John Perry, NQI senior quality advisor, with the

aide of several professionals from the tourism industry, developed the Ontario Tourism Excellence Program (OTEP) to assist businesses of any size to adopt and implement a focused approach of improvement to achieve desired results. Achieving OTEP certification will signify a commitment of quality to clients, employees, suppliers, and financial supporters.

Proponents comment that feedback from the program has been spectacular. According to Andrea Childs of Scotsman Point Resort, "the NQI program is a practical way to improve my business and I really encourage businesses in our sector in Canada to get involved in the program right away". Hugh Sibbald of The Briars Resort and Conference

Centre states, "we believe the future belongs to those who are focussed on quality for the long term and the NQI program is the roadmap for doing just that".

OTEP provides a voluntary, comprehensive approach to achieving organizational

excellence and a channel to gain nation-wide recognition in the tourism industry through and awards program. 🍁

For more information perry.john@nqi.ca.

Breaking news!

CTC president and CEO, Jim Watson, resigns from his position.

The CTC selects Palmer Jarvis DDB as its new advertising agency.

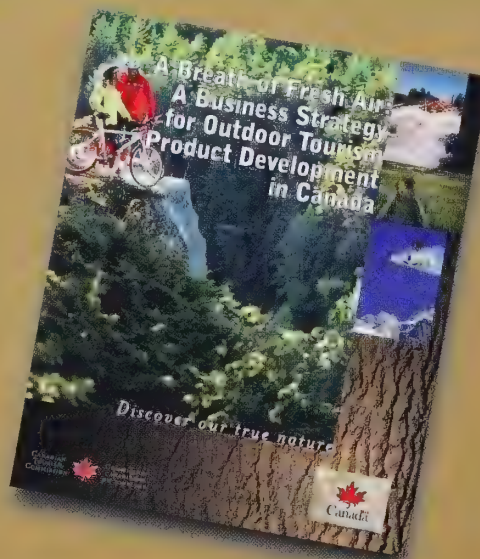
Find out more at www.canadatourism.com.

New publication targets outdoor sector

Research confirms that Canadian great outdoors stands out as one more compelling tourism feature to promote. The Canadian and international visitors alike. However, today's tourists are looking for more than beautiful vistas; they want to experience nature firsthand through a range of activities and service types.

The Canadian Tourism Commission (CTC) depends on research to confirm that product development work is efficient to market needs. To assist Canada's outdoor tourism industry to better prepare to meet market demand, the CTC has released a new publication entitled *A Breath of Fresh Air: A Business Strategy for Outdoor Tourism Product Development in Canada*. The publication is available through distribution 1-822-221-2211 or at www.canadatourism.com. 🍁

For more information: press@canadatourism.com.





Hong Kong an untapped market by Roger Laplante

Over the last few years, a number of influential factors have affected the Hong Kong long-haul pleasure travel market, including the handover of Hong Kong back to China and a major economic recession catalyzed by the Asian financial crisis. As a result of ongoing uncertainty in the marketplace coupled with the events of September 11, travel to Canada has suffered, with Hong Kong overnight arrivals in 2001 down 9.4 percent over 2000. Nevertheless, Hong Kong remains Canada's eighth largest overseas market in terms of overnight arrivals.

The Canadian Tourism Commission (CTC) in partnership with Ontario Tourism Marketing Partnership Corporation, Alberta Economic Development, Tourism British Columbia and Air Canada engaged PricewaterhouseCoopers to examine the purchasing patterns and vacation choices of Hong Kong long-haul pleasure travellers.

Market Size and Composition

The incidence rate for long-haul pleasure travel among Hong Kong adults is estimated at 44.6 percent. The incidence rate translates into a potential market of over 2.4 million long-haul pleasure travellers from Hong Kong. This incidence is the highest of the ten Asia-Pacific markets studied by the CTC over the last decade, confirming the high propensity for long-haul travel in this market. Spanning all age categories, long-haul pleasure travellers from Hong Kong are typically well educated, hold good jobs and have excellent spending power.

Travel Patterns and Trip Characteristics

Other than the U.S. and Australia, Canada is the third most popular destination for Hong Kong travellers outside of Asia and ninth overall. Pleasure or vacation travel clearly dominates the long-haul market while touring trips account for just over a third of all trips taken. This market still tends to favour holidays that take them to multiple destinations and allow them to see and do as much as possible.

Hong Kong long-haul pleasure travellers tend to take very short trips in response to the economic uncertainties. The family segment represents a full quarter of the market, which is relatively high compared with other markets.

Recent Travel to Canada

Travel to Canada tends to be driven by the visiting friends and relatives sector (VFR), with over half of all recent trips being mainly for VFR purposes. In fact, a remarkable 96 percent of recent travellers to Canada have friends or relatives living here.

Trips to Canada tend to be longer (averaging 18.4 nights), whereas total expenditures are almost 50 percent higher than for long-haul travel overall. Per person per day expenditures, however, are similar or even a little less than for the market overall.

Visitation to Canada tends to be focused on Vancouver and Toronto, with Niagara Falls also drawing its share of visitors. Travellers to Canada are a more elite group, better educated, older (over 40 percent are 45 to 64) and wealthier.

Future Potential and Barriers for Canada

Thirty seven percent of the potential long-haul pleasure travel market is interested in visiting Canada in the next year and 59 percent in the next five years, suggesting there is healthy interest in Canada as a vacation destination.

Canada definitely tends to attract the middle-aged traveller (45 to 64). In fact, the older the traveller, the greater the interest in Canada. Canada is less appealing to Hong Kong youths who tend to perceive it as an unexciting, low-key kind of place.

Knowing someone in Canada is definitely a key driver of interest and a critical factor in converting interest into actual travel, since an even higher percentage of recent travellers to Canada have VFR connections here (96 percent).



Travellers to Canada tend to visit larger cities, such as Victoria, B.C.

In terms of barriers, about 58 percent say they are waiting for the economy to improve before taking a long-haul holiday. Unfortunately for Canada, this sentiment is even stronger among its key demographic segment. A more specific barrier for Canada is that it is seen as being somewhat non-descript, with a lack of things to see and do. It is viewed as an ideal place for study and retirement, but not for an exciting vacation. Canada needs to do some major awareness building in this market to improve general knowledge of its regions, as well as specific places to go and things to see.

Market Interests and Travel Motivations

The top travel motivation for this market is good service and friendly people. Feeling safe while travelling is also critical for these risk-adverse travellers, as are cleanliness and outstanding scenery. This market also enjoys exciting, fast-paced trips and looks for destinations with abundant opportunities for having fun and being entertained. They also enjoy seeing well-known attractions and landmarks on their trips.

Potential travellers to Canada are more likely to be motivated by nature such as national parks or ecological sites and culture/history (historical places, arts and cultural attractions, unique native groups), reflecting the travel interests of the older, more educated group of travellers that make up the potential target market for Canada.

Variety Seekers and Culture/History/Nature Buffs are good motivational segments for Canada to target, with above average interest in visiting Canada in the next five years.

Competitive Positioning

Canada's major appeal is as a clean, safe place to bring the family and see striking scenery and nature. Prices for goods and services within Canada are also felt to be a strength, which may be tied to the currently favourable exchange rate.

On the downside, Canada is not regarded as a fun, exciting or enriching place to visit, all of which are top motivations. Canada tends to be perceived as unexceptional on most motivational dimensions examined and does not really have a distinctive image in Hong Kong.

The price-value perceptions analysis shows Canada rates well on perceived price. However, Canada is not that well positioned in terms of perceived value, being out-performed by the U.S. and Australia. Marketing efforts are needed to bring perceptions of Canada in line with the valued trip experience that it actually offers. Canada needs to build its image as a fun, exciting place to visit, with world-class attractions and a bonanza of touring opportunities. ★

The study is available at www.canadatourism.com or from distribution@ctc-cct.ca.

For more information laplante.roger@ctc-cct.ca.

TravelCanada.ca goes global

by Patrick Pichette

As part of its ongoing e-marketing strategy to standardize its online branding across all markets, the Canadian Tourism Commission (CTC) is in the process of localizing its consumer Web site, www.travelcanada.ca.

Localized versions of Travel Canada have recently been released for the United Kingdom, France and Germany. Australia / New Zealand, Mexico and possibly Hong Kong will be up and running before the end of the year. These Web sites will allow the CTC to distribute rich travel related content into several of its key markets, while collecting valuable information about its users.

In keeping with the domestic and U.S. versions, the new Websites' mandate is to inspire and compel visitors to choose Canada as a vacation destination with unbiased travel information on destinations and experiences in Canada, while serving as a portal to official provincial, territorial and municipal Web sites.

Although some of the content is identical across all versions, the localization process has customized the Web sites, geared to the specialized needs of each specific market. Above and beyond translating content, new components such as Canada Specialist and tour operator search tools have been added. Other components such as vacation guide orders, travel tips and upcoming consumer shows have been written for each respective market. To insure the independence and relevancy of each Web site's content, the CTC has invested in a state-of-the-art content management system that allows its in-market staff to add, edit or delete content at will.

Travel Canada had an immediate impact on the CTC's marketing initiatives in Canada and the United States when released last May, and will add significant value to the marketing programs overseas. The new Web sites will increase traffic to partner Web sites and provide a new medium with which the



CTC's in-market staff can highlight special campaigns and promotions.

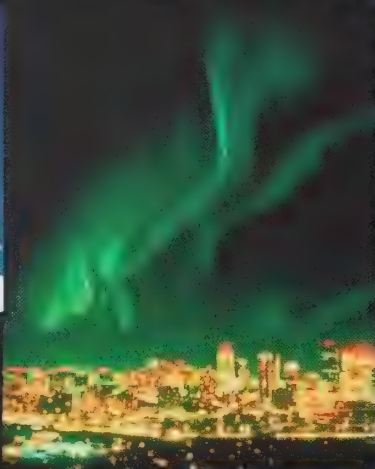
A campaign is currently under way in Europe to create awareness for the new Web sites. The campaign is based on three pillars: search engine optimization, online advertisement and cross-media promotion. The same approach was successful in Canada and the United States, as the number of visitor sessions between July and September 2002 increased

176 percent when compared to the same period in 2001.

By the second quarter of 2003, Travel Canada is also scheduled to be localized in the CTC's key remaining markets of Italy, Netherlands, Japan, China, Taiwan, South Korea and Brazil. 🍁

For more information
pichette.patrick@ctc-cct.ca

New Industry Proposal Program!



What?

The European and Latin America Program has developed a new initiative inviting the industry to submit proposals to access CTC partnership funds. The objective is to address current market needs. Proposals should therefore be consistent with the 2003-2004 objectives and strategies for the Europe program.

Who?

Lead applicants should be tourism industry organizations, associations and businesses directly involved in the marketing of tourism products, packages and services. Equally, CTC Product Club graduates are encouraged to present a project under this program.

How?

Get the program guidelines on the CTC website at: www.canadatourism.com and send your proposal to lafleur.sylvie@ctc-cct.ca.

When?

Applications will be considered throughout the year, in or before the first week of January 2003, and available budgets will be allocated on a first come first served basis. Proposals sent before the first week of January will be rejected.



Discover our true nature



The Research Viewpoint

Canada a leader in market studies by Scott Meis

If you ever have a chance to compare, you may find that our marketing materials are different from place to place. Even though we are selling the same thing in Mexico as we are in Germany – tourism in Canada – our approach is very different, depending on what we know about these and other countries.

How do we know about these different markets? What justifies the different approaches? The answer comes from one of the ongoing series of studies we do for other departments here at the CTC and for the industry at large: in-market consumer studies. These studies offer a very detailed snapshot and analysis of a country's long-haul international travel consumer market. Like a scientist adding dye to a liquid to see its properties, these studies add questions to focus groups and variables to market data, in order to show the market's

structure and to segment the market along different lines.

This allows us to write a very detailed report on the market, including the size of the population likely to travel to Canada, travel behaviour, booking trends, and motivations. We can measure activities engaged in and tourism products consumed, how much visitors spend, as well as perceptions of Canada, our competitive position, and views of air travel suppliers.

We have learned a few fascinating things along the way. For one, we found that a country's long-haul travel market, once developed, does not change very much. There is a certain amount of predictability to doing a study on a country like Germany, for example. In developed countries about five per cent of the population are considered potential long-haul travellers and this

does not change very much unless there are real shocks to a country's economy.

Another thing we have learned is that there are real, tangible differences between developing markets and more mature ones. Using the examples of Germany and Mexico, in the mature German consumer market the market segments are more easily defined. Travel consumers there know more about Canada and are more likely to want specific experiences.

In the less-developed Mexican market, however, travel consumers are less informed about Canada and are much more general in their approach. Mexican consumers are buying the Canada brand, whereas Germans are buying an experience within Canada.

This has very direct implications for how we approach these markets. Our marketers have made these

consumer studies required reading, and have often tailored their approach to their target country based on what they read.

We started doing the consumer studies after the experience of the National Task Force on Tourism Data, held in 1984-86, when we developed a standardized approach to study these markets. To date we have done more than three dozen consumer studies. We must be doing something right, because we have won international distinction for them, notably from the Travel and Tourism Research Association. Today a handful of countries are playing catch-up in this area, such as Australia and Ireland, but Canada remains a world leader. I guess you could call it one of our successes! 🍁

The consumer studies are available at www.canadatourism.com, via the research links.

Project assesses destination sustainability by Denisa Georgescu

The Canadian Tourism Commission (CTC) and Parks Canada are sponsors of a recent study, *"Ecotourism/ Sustainable Tourism: A Canadian Case Study of Measurement Relating to Human Use Management in Protected Environments"*. The objective is to find ways to improve planning in parks, tourism destinations and host communities. *Consulting and Audit Canada (CAC)* is conducting the study.

In October 2002, CAC brought together tourism stakeholders from the Cape Breton region in a workshop held in Ingonish, Nova Scotia, seeking mutual agreement concerning the identification and protection of shared tourism assets. Many organizations participated in this venture, from small tourism operators to members of local chambers of commerce, parks planners, visitor managers, repre-

sentatives of tourism marketing bodies, and hotels in the region.

The specific goals of the workshop were: to clarify the relationship between "sustainable tourism" and "ecotourism"; to identify the values involved in each form of tourism in the study area; and to identify key risks, opportunities and indicators pertaining to ecotourism and sustainable tourism.

The participatory indicators approach has proven to be a versatile tool in forging partnership and consensus on issues relating to the planning and management of destinations. In the recent *International Conference Board* workshops in Bongani South Africa, the procedure achieved some prominence as a means to identify key opportunities and to help refine the methodology

for the development of indicators of sustainable tourism. It has been the catalyst for debate on the future of many destinations worldwide as a means of focusing deliberations on key values associated with sustainable tourism development.

Jennifer Sipkens has been spearheading the creation of the *Sustainable Tourism Association of Canada (STAC)*, an organization with its roots in the CTC Product Clubs program through the Ecotourism Product Club of the *Canadian Biosphere Reserves Association*. "The long-term sustainability of both the human community and the environment at tourism destinations will certainly be important to the success of the tourism industry," says Sipkens. "We do have to remember that the industry also has to be financially sustainable,

and therefore must play the key role in determining its future."

"In light of provincially-driven changes to access criteria and regulations currently faced by tourism operators in B.C.," adds Neil Hartling, chair of the CTC's outdoor experiences sub-committee, "the tourism industry certainly needs better input into the destination management decision-making process."

There are expectations that studies like this one could generate the type and amount of tourism most compatible with a destination's long-term sustainability. 🍁

For more information on the Cape Breton project Ted.Manning@cac.gc.ca

Winter business outlook

With the events of September 11 now over a year behind us, it appears that the tourism industry worldwide is easing its way back to recovery and begin to move forward. Based on the latest winter 2003 Canadian Tourism Commission (CTC) *Business Outlook* findings*, the fragile recovery will be led by leisure travellers. Recent surveys continue to suggest that leisure travellers' desire for out-of-town travel remains strong. Meanwhile, concerns about personal safety and security are diminishing – at least for domestic travel – while concerns about the economy and lack of time are once again proving to be the major reasons consumers are choosing not to travel.

North America markets

For the winter of 2003, domestic leisure travel is expected to increase by 4 percent while U.S. leisure will be up by 2.7 percent. On the other hand, economic uncertainties are still stalling a full recovery in business travel with domestic business travel increasing only by a modest 1.0 percent and U.S. business travel fairing better at 2.0 percent. Canada will continue to benefit from more Mexican visitors as the BO Monitor participants expect growth of 2.5 percent.

Europe

Canada will continue to make inroads into the U.K. travel market, where the number of U.K. visitors is expected to increase by 4.8 percent overall, with business travel lagging leisure travel but posting a solid 4.0 percent gain. Weaker consumer and business confidence, coupled with limited air capacity growth to Canada, will weigh on French travel. Overall, it is expected to grow a

meager 1.1 percent. For Germany, the outlook is positive with 3.9 percent growth expected, although this compares to a 10.0 percent decline in 2001. Italy is expected to post an overall gain of 1.0 percent while Netherlands is expected to increase by 3.0 percent.

Asia/Pacific

The dour economic situation continues in Japan where deflation is a concern and economic worries feature high on consumers' lists. While package tour sales are starting to show signs of growth, sales to Canada and the U.S. continue to lag behind. Although air capacity does not represent a problem with 12 percent more seats, the BO Monitor participants suggest that travel to Canada for the 2003 winter will rise by only 1.0 percent. In Taiwan, the economy continues to fare well, but unfortunately, air capacity to Canada is expected to be reduced by 6.0 percent and, as such, the outlook is for a decline of 5.0 percent. South Korea, Hong Kong and China are expected to post growth rates of 1.5, 2.5 and 3.8 percent respectively. The overall outlook for Australian visits is for an increase of 3.5 percent, although this compares to a decline of 18.0 percent during the same period in 2001.

Overall, 2003 will start off somewhat brighter, but the uncertainties associated with the global economy, the events of September 11 and a possible conflict in the Middle East are still deterring a recovery of overseas travel to Canada. 🍁

For more information
laplante.roger@ctc-cct.ca.

A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
TOURISTS TO CANADA			
From the U.S.	January – Sept. 2002	13,359,398	2.6
By Auto	January – Sept. 2002	8,810,562	6.4
By Non-auto	January – Sept. 2002	4,548,562	-4.1
From Overseas - Total	January – Sept. 2002	3,158,969	-9.0
United Kingdom	January – Sept. 2002	612,216	-13.8
Japan	January – Sept. 2002	333,377	-7.7
France	January – Sept. 2002	259,156	-14.9
Germany	January – Sept. 2002	251,014	-15.1
Hong Kong	January – Sept. 2002	97,096	-10.0
Australia	January – Sept. 2002	124,091	-9.3
Taiwan	January – Sept. 2002	84,031	-17.3
Mexico	January – Sept. 2002	134,363	4.1
Korea (South)	January – Sept. 2002	123,672	4.0
OUTBOUND CANADIAN TOURISTS			
To the U.S.	January – Sept. 2002	10,335,702	-7.5
By Auto	January – Sept. 2002	6,256,053	-0.9
By Non-Auto	January – Sept. 2002	4,079,649	-16.2
To Overseas - Total	January – Sept. 2002	3,717,371	-6.7
EMPLOYMENT IN TOURISM			
Total Activities	Second Quarter, 2002	573,900	0.1
Accommodation	Second Quarter, 2002	165,500	1.2
Food and Beverage	Second Quarter, 2002	154,900	1.9
Transportation	Second Quarter, 2002	95,100	-4.9
SELECTED ECONOMIC INDICATORS			
Personal Disposable Income per person	Second Quarter, 2002	\$22,252	1.2
GDP at market prices (current, \$ billion)	Second Quarter, 2002	1,138.2	2.8
GDP chained (1997, \$ billion)	Second Quarter, 2002	1,059.4	1.1
CPI (1992=100)	September 2002	120.1	2.3
EXCHANGE RATES (IN CDN\$)			
American dollar	October 2002	1.5778	0.4
British pound	October 2002	2.4576	7.8
Japanese yen	October 2002	0.0127	-1.6
EURO	October 2002	1.5484	8.9

Note: All tourist estimates deal with trips of one or more nights. All data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

Domestic and International Winter 2003 Business Outlook

	LEISURE TRAVEL GROWTH RATE YEAR-OVER-YEAR	BUSINESS TRAVEL GROWTH RATE YEAR-OVER-YEAR	TOTAL GROWTH RATE YEAR-OVER-YEAR
Domestic	4.0%	1.0%	2.9%
U.S.	2.7%	2.0%	2.6%
U.K.	5.5%	4.0%	4.8%
Japan	1.5%	2.0%	1.0%
Germany	5.5%	1.5%	3.9%
France	0%	2.0%	1.1%

Source: Business Outlook Monitor

*Survey of advance bookings derived from a Business Outlook (BO) Destination Supplier/Receptive Agent Monitor, produced for the CTC by the Canadian Tourism Research Institute

Regional satellite accounts

On April 29, 2002, Statistics Canada released *The Provincial and Territorial Tourism Satellite Accounts* (PTSA) for the reference year 1996, the first study of its kind in Canada and elsewhere.

The Canadian Tourism Commission, in partnership with Statistics Canada, is now developing an update for the reference year 1998.

The objective of the 1998 PTSA is to provide a more timely regional tourism account as well as to improve analysis at a regional level. Currently, only one regional tourism account exists (for 1996) and therefore no time series analysis can be undertaken.

Once completed, the PTSA 1998 will include 26 bilingual statistical tables, 2 for each province and territory, and a national table. A bilingual analytical report highlighting the findings by province/territory, and detailing any changes in concepts or methodology from the PTSA 1996 will also be part of the end product. The report will provide time series analysis for the years 1996 to 1998. The 1998 PTSA is expected to be completed by May 30, 2003. 🍁

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Tourism Roundup

According to the U.K. edition of *Condé Nast Traveler*, international travellers think **Fairmont Hotels** are among the best the world has to offer. In the October issue of the magazine's annual reader's travel awards, Canadian properties turning up on this year's Word's Top 100 list were The Fairmont Banff Springs and the Fairmont Chateau Lake Louise.

The Ontario provincial government has launched a new **Tourism Consumer Information System (TCIS)**. The system is a \$16.2-million, interactive, integrated travel and tourism service that will make information on travelling in Ontario more accessible for travellers and tourism businesses. TCIS will incorporate a customer relationship management system, which integrates a call centre, brochure fulfillment centre, customer services database, business-to-customer (B2C) Web site and business-to-business (B2B) Web site.

Saskatchewan Naturally Magazine has won a bronze medal in a premier international magazine competition at the *International Regional Magazine Association (IRMA)* 2002 Awards ceremony held in Montana this fall. The IRMA awards recognize achievement in magazine writing, photography, and design. The magazine won for its article *Tolstoy, the Bible, and Everything*, a story about Saskatchewan's Doukhobor community past and present.

CHIP Hospitality is the B.C. winner of the 2002 North American Occupational Health and Safety Week award in the tourism and hospitality category. The award came as a result of CHIP's participation in Occupational Health and Safety Week last May, designed to focus the attention of employers, employees, the general public and all partners in occupational health and safety on the importance of preventing injury and illness in the workplace.

The **Okanagan Shuswap Bioregion Product Club**, branded as Bearfoot Canada, has officially been launched. The initiative will see the development of a permanent nature-based travel strategy for the Okanagan and Shuswap regions in the southern interior of British Columbia, and develop a partnership of 30 adventure and ecotourism businesses, to be linked with environmental organizations, tourism associations and economic development agencies, the private sector and local government. This alliance will be a catalyst and clearinghouse for adventure travel/ecotourism development and travel packaging within the Okanagan and Shuswap Regions.

Hospitality Newfoundland and Labrador, the province's tourism industry association, is producing a television series, tentatively scheduled to air on NTV in January, 2003 to profile unique attractions and amenities in the industry. The 13-episode series is intended to elevate awareness of tourism and its value to the province's economy, and to encourage tourism travel. One of the co-hosts for the series will be Stan Cook Jr., president of the Adventure Tourism Association of Newfoundland and Labrador and a member of the Canadian Tourism Commission's Outdoor Experiences sub-committee. The main host for the series will be Grand Falls-born actor, playwright and author, Gordon Pinsent.

Newfoundland and Labrador Tourism Minister Julie Bettney says that, since 1998, the number of non-resident travellers has grown by 12 per cent to 427,000 visitors in 2001. She estimated the value of these visits at \$300 million, a 22 per cent increase. "Tourism makes up about two per cent of our gross domestic product," Bettney pointed out at a recent meeting of Hospitality Newfoundland and Labrador. "That may not sound like a lot, but that is more than agriculture, more than fish

harvesting, and more than fish processing in this province," she said.

Finance Minister John Manley is calling on both the air industry and airline travellers to help determine what should be done about the **Air Travellers Security Charge** that took effect last April. Although the federal government has been saying it cannot afford to cut the controversial air security tax right now, impending changes to Ottawa's accounting methods may permit it to lower the charge as early as the 2003 budget. Manley would like to receive public and industry suggestions by Dec. 31.

More than 200 established and emerging artists from the East Coast will be heading to the nation's capital between April 22 and May 4, 2003, for *Atlantic Scene* – the first in a series of biennial regional festivals by Canada's **National Arts Centre** showcasing the best in Canadian arts and culture from coast to coast. These artists will appear in over a dozen venues in Ottawa-Gatineau, performing a wide range of musical genres such as classical, rock, pop, jazz, blues, world beat, folk, Celtic, Acadian, Aboriginal and more. *Atlantic Scene* will also feature theatre, comedy, dance, a major retrospective of Atlantic Canadian film, and a visual arts exhibit. Says Peter Herrndorf, president and CEO of the National

Arts Centre, "Atlantic Scene will draw national attention to Atlantic Canada and give Canadians a far better understanding of the culture, history, values and traditions of (the region)."

Minister of Canadian Heritage Sheila Copps has announced that Ottawa will host the 2003 **Juno Awards** from April 4 to 6. "This announcement represents a unique opportunity to showcase some of Canada's best and brightest musical talent right here on our national stage," said Minister Copps. Marcel Beaudry, chair of the National Capital Commission, says, "I am extremely proud of the collaboration that has taken place between a number of organizations to unite both the Ontario and the Quebec side of the Ottawa River for this celebration of Canadian Music."

From Dec. 17, 2002 to Jan. 12, 2003, **the Vatican** will host an exhibition of nativities. Quebec will be prominently featured thanks to the efforts of the Canadian Tourism Commission's Italian office, and the participation of Quebec and Canadian tourism partners. Twenty thousand people from all over the world pass through the site daily, and during Christmas time that number increases dramatically; visibility for Canada will be excellent.



Winter is in the air, and ski season is around the corner; technicians install the "Stairway to Heaven" lift towers atop Kicking Horse Mountain Resort.



Glenn Dobbin has been appointed general manager of Ontario Place Corporation. He is returning to Canada from his most recent position as general manager at Legoland Windsor Ltd. in London, England.

Marie-Paule Dupont, formerly with the Latin America program, has accepted the position of marketing specialist for Asia/Pacific at the Canadian Tourism Commission.

Maude Laliberté and **Jennifer Hendriks** have joined the Canadian Tourism Commission's Europe/Latin America program.

Chris Shepler, of Mackinaw City, Michigan, will serve as chair of the 2005 National Tour Association Annual Convention in Detroit. Shepler is vice president of Shepler's Mackinac Island Ferry in Mackinaw City.

Tourism Calgary president and CEO **Joe Fardell** will chair the Rendez-vous Canada 2003 Advisory Committee, overseeing the country's annual international tourism industry marketplace.

Fardell was elected to the position by the board of directors of the Tourism Industry Association of Canada; the 2003 event will take place May 24 to 28 in Vancouver.

Northwest Territories Arctic Tourism Association's board of directors has announced the appointment of **Brian Desjardins** to the position of communications manager. Prior to his appointment Desjardins held the position of tourism and fundraising coordinator for the Town of Inuvik.

Stéphane Gruber has joined the Canadian Tourism Commission's publishing & distribution unit to provide design services. Gruber has recently completed a two-year advertising program at Algonquin College with a major on copywriting.

Frank Verschuren has been appointed Acting Director of Product Development at the Canadian Tourism Commission (CTC). Verschuren has most recently been a product coordinator with the CTC. In addition to his new duties he will continue to look after the outdoor tourism product development portfolio

and will assume responsibility for the Aboriginal tourism product development portfolio.

Oliver Martin, formerly executive assistant to the president of the Canadian Tourism Commission (CTC), has undertaken an interim position as marketing officer with the CTC's U.S. marketing program.

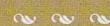
Tanya Snook joined the Canadian Tourism Commission E-marketing team in November, where she will be in charge of content for the CTC consumer Web sites. Most recently, she was with Export Development Canada, where she managed Web-related projects in her role as business analyst. ★



Nancy Huston

Tourism Profile

To keep our readers informed about key decision-makers in Canada's tourism industry, *TOURISM* is introducing the members of the Canadian Tourism Commission (CTC) board of directors. Each profile highlights the personal vision of these industry leaders as they voice their opinions on important issues facing the tourism sector.



Nancy Huston is the British Columbia / Yukon private sector representative on the Canadian Tourism Commission (CTC) board of directors. She is the co-owner of three retail businesses in Whitehorse, Yukon: *Midnight Sun Gallery & Gifts*, the *Whitehorse General Store*, and the new airport store *Yukon Memories*.

Huston is currently the vice-president of the Tourism Industry Association of the Yukon and has actively served on the Yukon Convention Board, the Yukon Tourism Training Fund Committee and various Yukon Marketing Partnership committees. In 2001, she was presented with *The Yukoner* award for her significant contribution to the development of tourism in the Yukon.

Huston sees Canada as both beautiful and safe yet relatively undiscovered, with a huge potential to develop new and innovative products and increase market share. "We should not shy away from our weather - we should embrace it," she says. "Many countries do not have four seasons and I believe winter should play a much larger role in marketing Canada in the future."

"The CTC must continue to have a strong international marketing focus," says Huston, acknowledging that "given the diverse geographical and cultural make-up of Canada we may be called upon to re-evaluate and possibly increase our role in regional and domestic initiatives." She recognizes the need to attract more partners and that the CTC will face challenges in the future to provide meaningful partnerships with small and medium tourism businesses and DMO's.

Huston emphasizes that the CTC will need to deliver an understanding of the shifting patterns of both leisure and business travellers "to know where and how we should place our money and in what markets. In a world that continues to be threatened by uncertainty and hostility, knowing how the public plans to spend its leisure time will affect our marketing strategies dramatically. The CTC must be in the forefront of this knowledge." ★

New rolling stock on track for VIA

by Daryl Adair

This December there is a new option for travelling between Toronto and Montréal for the Holiday season. The train is VIA Rail Canada's *Enterprise*, and while it has been operating since 2000, this overnight service is the first train in Canada to be operating with VIA Rail's new Renaissance cars. Originally planned for an overnight European service through the "Chunnel" across the English Channel, a total of 139 new cars were purchased by VIA Rail Canada in December of 2000 with funding from the Federal government. Brought to Canada for assembly, they have been in service since June 23 this year.

The train and its new equipment, primarily used for business travellers, are proving to be very popular. According to VIA Rail Product Manager for the Quebec-



Photo: VIA Rail

The new Renaissance cars.

Windsor Corridor, Bernard Aubin, "this past fall there were Japanese tour groups booked on the train and we expect it is going to be a very busy Christmas season on the train. We expect it to sell out, especially after the feedback we received when the train was shown to visitors as the CBC anniversary train." ★

Daryl Adair is the owner/operator of Rail Travel Tours and can be reached through www.railtraveltours.com

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